



FRANCHISE TAX BOARD TAX TECHNICIAN, FTB OPEN EXAMINATION J198 - 7505 8PB44

CALIFORNIA STATE GOVERNMENT---AN EQUAL EMPLOYMENT OPPORTUNITY EMPLOYER---PROVIDES OPPORTUNITIES TO ALL REGARDLESS OF RACE, COLOR, CREED, NATIONAL ORIGIN, ANCESTRY, SEX, MARITAL STATUS, DISABILITY, RELIGIOUS OR POLITICAL AFFILIATION, AGE OR SEXUAL ORIENTATION.

Applicants should be aware that prior to employment with the Franchise Tax Board a background investigation will be conducted. The investigation will consist of completion of a questionnaire, fingerprinting, and inquiry to Department of Justice to disclose criminal records. Employment offers will be made prior to completion of the questionnaire. A commitment to hire will **not** be considered final until the background information has been reviewed and approved by the department.

Filing and Processing Information

Continuous Filing and Testing

This is an open, continuous examination. Applications will not be accepted on a promotional basis. Applicants who meet the minimum qualifications may apply for and take this examination. Meeting the minimum qualifications to compete in the Tax Technician examination does not assure placement on the eligible list. Competitors must successfully pass the examination.

Testing Period

The testing period for this examination is 9 months. Candidates who have taken this exam, whether they pass or fail, must wait 9 months before retesting.

How to Apply

You may apply and take the examination on the internet by connecting to the State Personnel Board (SPB) website at https://exams.spb.ca.gov/exams/exam_start.cfm.

Do not mail or deliver a completed state application form (STD. 678) to the State Personnel Board or Franchise Tax Board, as it will not be accepted for this examination. The application form for this examination is contained in the Internet Application Process.

Monthly Salary Range

Range A: \$2495 - \$3034
Range B: \$2817 - \$3426

Range A - This range will apply to individuals who do not meet the criteria for Range B.

Range B - This range will apply to individuals who have either: 1) satisfactorily completed 6 months of experience as a Tax Technician, FTB, Range A and at least two courses in basic accounting or at least one course each in basic accounting and business or commercial law; or 2) one year of experience performing duties at a level of responsibility equivalent to Tax Program Technician I (Taxpayer Services); or 3) the equivalent to graduation from college (four-year degree), which must include at least two courses in basic accounting or at least one course each in basic accounting and business or commercial law.

Current salary levels and placement/movement in the appropriate salary range(s) should be confirmed with the hiring department upon receiving a job offer. The salaries used in this bulletin are the latest available from the State Controller's Office, but may not reflect the most recent salary adjustment.

Special Testing Arrangements

If you have a disability and need special testing arrangements, call the State Personnel Board's Examination and Selection Services Section at (916) 653-1502, Telecommunications Device for the Deaf (TTY) (916) 654-6336, or via California Relay (Telephone) Service for the deaf or hearing impaired: from TTY phones: (800) 735-2929, for voice phones: (800) 735-2922.

**Requirement for
Admittance to the
Examination**

Applicants who meet the minimum qualifications may apply and take this examination at any time.

Either I

One year of experience in the California state service performing duties at a level of responsibility equivalent to that of a Tax Program Assistant, Range C.

Or II

Sixty semester or ninety quarter units of college which must include at least two courses in basic accounting or at least one course each in basic accounting and business or commercial law (persons who will complete the coursework requirements during the current quarter or semester will be admitted to the examination, but they must produce evidence of successful completion of the curriculum and the prescribed courses before they may be considered eligible for appointment).

Or III

Three years of increasingly responsible experience in a financial, commercial, or governmental establishment, at least one year of which shall include one or a combination of activities involving the 1) marketing, distribution, and sale of merchandise; 2) approval of loans; 3) collection on delinquent accounts; or 4) contact of client-customer services which involves the explanation of policies, regulations, or procedures for a public agency or private institution such as a bank, insurance company, credit bureau, or title company.

**Position Description
and Location**

A Tax Technician, FTB, under general supervision, performs paraprofessional tasks of tax and non-tax law, regulation and policy enforcement. **Collection Program:** analyzes, determines appropriate action and initiates various courses of action on collection accounts; communicates with taxpayers to resolve collection problems; prepares bankruptcy or probate claims responding to contacts that may be adversary in nature and follows up to assure final resolution. For special procedures, prepares, adjusts and amends or withdraws bankruptcy or probate claims and responds to verbal and written correspondence regarding objections to and rejection of bankruptcy claims. **Call Center or Public Counter functions in Collections, Audit and Filing Programs:** communicate with taxpayers via incoming phone calls or in person; advises, assists and explains various provisions of laws and regulations administered by the department and in the preparation of individual and corporate tax returns and property tax assistance claims; resolve collection notice problems; handle liability disputes; initiate transactions to correct account errors and modify or release accounts; explain the basis for the liabilities; identify, analyze and release liens; analyze financial statements and recommend payment arrangements; issue assessments for missing years and recommend discharge from accountability. In an **Audit** setting: performs desk audits and prepares adjustment notices based on audit findings; communicates with tax payers to resolve issues developed by the audit; takes appropriate action on protests of adjustment notices and provides technical assistance to other technicians and clerical support staff. In a **Program Support** area: performs equivalent paraprofessional, staff or administrative specialties in support of the department's programs. This includes completion of less complex research, analysis, modification and implementation of various legislative proposals, operational changes, forms and quality maintenance procedures and systems used to support and maintain the department's audit and compliance programs. **Positions exist statewide and out of state (including Chicago IL, Houston TX, and Manhattan NY).**

Examination Information	Interviews will not be held. This examination will consist of a Training and Experience Evaluation weighted 100%. Candidates who do not meet the minimum qualifications will not be placed on the resulting eligible list. In order to obtain a position on the eligible list, a minimum rating of 70% must be attained.
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Training & Experience Evaluation – Weighted 100.00%

In evaluating candidates' knowledge, skills, and abilities, the examination has been developed to measure each candidate's:

Knowledge of:

1. Provisions of the rules, regulations, organizations, and procedures of the Franchise Tax Board.
2. In one or more program areas and applicable tax or non-tax laws.
3. One or more of the functions, applications or processes administered and performed by the Franchise Tax Board.
4. Business and financial practices.
5. Current office methods, technologies, and equipment.
6. Mathematics, spelling, grammar, punctuation, and modern English usage.

Ability to:

1. Interpret, apply, and/or explain provisions of governmental, tax or non-tax rules, regulations, and departmental procedures and policies.
2. Learn rapidly and follow directions.
3. Communicate effectively and tactfully with other staff and with the public in person or over the telephone, including situations involving difficult, disagreeable, and adversarial contacts.
4. Analyze and interpret written and numerical data accurately and adopt an effective course of action.
5. Evaluate situations quickly and accurately, and take effective action.
6. Learn to utilize personal computer systems and software applications in the performance of work.
7. Accurately and quickly enter data into a computerized database.
8. Recognize questions or situations outside the employee's area of responsibility or knowledge and refer these to appropriate sources.
9. Write effectively.

Eligible List Information	<p>An open eligible list will be established for the Franchise Tax Board. Names of successful candidates will be merged on the eligible list in order of final scores regardless of test date.</p> <p>Eligibility expires 12 months after it is established. Candidates must then retest to re-establish eligibility.</p>
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Bilingual Information	Bilingual positions exist for candidates fluent in Spanish. Candidates who are certified and appointed to a bilingual Tax Technician position shall receive an additional \$100.00 a month.
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Veterans' Points and Career Credits	<p>Veterans' preference points will be added to the final score of all candidates successful in this examination who qualify for and have requested these points. (See "General Information" on this bulletin for information regarding veterans' preference points.)</p>
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Career credits will not be granted in this examination.

GENERAL INFORMATION

If you meet the requirements stated on this bulletin, you may take this examination, which is competitive. Possession of the entrance requirements does not assure a place on the eligible list. Your performance in the examination described on this bulletin will be compared with the performance of the others who take this test, and all candidates who pass will be ranked according to their scores.

The Franchise Tax Board reserves the right to revise the examination plan to better meet the needs of the service if the circumstances under which this examination was planned change. Such revision will be in accordance with civil service laws and rules and all competitors will be notified.

Eligible Lists: Eligible lists established by competitive examination, regardless of date, must be used in the following order: 1) sub-divisional promotional, 2) departmental promotional, 3) multi-departmental promotional, 4) service-wide promotional, 5) open eligible list. When there are two lists of the same kind, the older must be used first. Eligible lists will expire in one to four years unless otherwise stated on this bulletin. In the case of continuous testing examinations, names are merged into the appropriate eligible list in order of final test scores (except as modified by veterans preference credits) regardless of the date of the test and the resulting eligible lists will be used only to fill vacancies in the area(s) shown on the bulletin.

General Qualifications: Candidates must possess essential personal qualifications including integrity, initiative, dependability, good judgment, and ability to work cooperatively with others, and a state of health consistent with the ability to perform the assigned duties of the class.

Veterans Preference: California law limits the granting of veterans preference points in open entrance examinations and open non-promotional examinations. Credits in open examinations are granted as follows: 10 points for veterans, widows, or widowers of veterans, and spouses of 100 percent disabled veterans; and 15 points for disabled veterans. Credit in open non-promotional examinations is granted as follows: Five points for veterans; and 10 points for disabled veterans. Directions for applying for veterans' preference are on the Veterans Preference application which is available from the State Personnel Board office, and the Department of Veterans Affairs, PO Box 1559, Sacramento, CA 95807.

IT IS AN OBJECTIVE OF THE STATE OF CALIFORNIA TO ACHIEVE A DRUG-FREE WORK PLACE. ANY APPLICANT FOR STATE EMPLOYMENT WILL BE EXPECTED TO BEHAVE IN ACCORDANCE WITH THIS OBJECTIVE BECAUSE THE USE OF ILLEGAL DRUGS IS INCONSISTENT WITH THE LAWS OF THE STATE, THE RULES GOVERNING CIVIL SERVICE AND THE SPECIAL TRUST PLACED IN PUBLIC SERVANTS.

Questions?

If you have any questions concerning this announcement, please contact:

State Personnel Board
801 Capitol Mall
Sacramento, CA 95814
(916) 653-1502, TTY (916) 654-6336, or via
California Relay (Telephone) Service: (800) 735-2929, (800) 735-2922 (Voice)
